



# Energy manager

## Key information

- ✓ Proposal approved
- ✓ Occupational standard approved
- ✓ End-point assessment plan approved
- ✓ Funding approved

**Reference:** ST0161

**Level:** 3

**Typical duration to gateway:** 24 months

**Typical EPA period:** 4 months

**Maximum funding:** £10000

**Route:** Construction and the built environment

**Integration:** None

**Date updated:** 03/03/2025

**Lars code:** 68

**EQA provider:** Ofqual

**Example progression routes:**

BEMS (building energy management systems) controls engineer

**Review:** this apprenticeship will be reviewed in accordance with our change request policy.

## End-point assessment plan

### Introduction and overview

This document explains the requirements for end-point assessment (EPA) for the energy manager apprenticeship. End-point assessment organisations (EPAOs) must follow this when designing and delivering the EPA.

Energy manager apprentices, their employers and training providers should read this document.

A full-time energy manager apprentice typically spends 24 months on-programme. The apprentice must spend at least 12 months on-programme and complete the required amount of off-the-job training in line with the apprenticeship funding rules.

The EPA should be completed within an EPA period lasting typically 4 months.

The apprentice must complete their training and meet the gateway requirements before starting their EPA. The EPA will assess occupational competence.

An approved EPAO must conduct the EPA for this apprenticeship. Employers must work with the training provider to select an approved EPAO.

This EPA has 2 assessment methods.

The grades available for each assessment method are below.

Assessment method 1 - technical report and presentation with questions:

- fail
- pass
- distinction

Assessment method 2 - interview with underpinning portfolio of evidence:

- fail
- pass
- distinction

The result from each assessment method is combined to decide the overall apprenticeship grade. The following grades are available for the apprenticeship:

- fail
- pass
- merit
- distinction

## **EPA summary table**

<p><b>On-programme - typically 24 months</b></p>	<p>The apprentice must:</p> <ul style="list-style-type: none"> <li>• complete training to develop the knowledge, skills and behaviours (KSBs) outlined in this apprenticeship’s standard</li> <li>• complete training towards English and mathematics qualifications in line with the apprenticeship funding rules</li> <li>• compile a portfolio of evidence</li> </ul>
<p><b>End-point assessment gateway</b></p>	<p>The apprentice’s employer must be content that the apprentice is occupationally competent.</p> <p>The apprentice must:</p> <ul style="list-style-type: none"> <li>• confirm they are ready to take the EPA</li> <li>• have achieved English and mathematics qualifications in line with the apprenticeship funding rules</li> </ul> <p>For the technical report and presentation with questions, the apprentice must submit a technical report proposal of up to 500 words.</p> <p>For the interview with underpinning portfolio of evidence, the apprentice must submit a portfolio of evidence.</p> <p>Gateway evidence must be submitted to the EPAO, along with any organisation specific policies and procedures requested by the EPAO.</p>
<p><b>End-point assessment - typically 4 months</b></p>	<p><b>The grades available for each assessment method are below</b></p> <p>Technical report and presentation with questions:</p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• distinction</li> </ul> <p>Interview with underpinning portfolio of evidence:</p> <ul style="list-style-type: none"> <li>• fail</li> </ul>

	<ul style="list-style-type: none"> <li>• pass</li> <li>• distinction</li> </ul> <p><b>Overall EPA and apprenticeship can be graded:</b></p> <ul style="list-style-type: none"> <li>• fail</li> <li>• pass</li> <li>• merit</li> <li>• distinction</li> </ul>
<b>Re-sits and re-takes</b>	<p>The details for re-sits and re-takes are below:</p> <ul style="list-style-type: none"> <li>• re-take and re-sit grade cap: pass</li> <li>• re-sit timeframe: typically 2 months</li> <li>• re-take timeframe: typically 4 months</li> </ul>

## Duration of end-point assessment period

The EPA is taken in the EPA period. The EPA period starts when the EPAO confirms the gateway requirements have been met and is typically 4 months.

The EPAO should confirm the gateway requirements have been met and start the EPA as quickly as possible.

## EPA gateway

The apprentice's employer must be content that the apprentice is occupationally competent. That is, they are deemed to be working at or above the level set out in the apprenticeship standard and ready to undertake the EPA. The employer may take advice from the apprentice's training provider, but the employer must make the decision. The apprentice will then enter the gateway.

The apprentice must meet the gateway requirements before starting their EPA.

They must:

- confirm they are ready to take the EPA
- have achieved English and mathematics qualifications in line with the apprenticeship funding rules
- submit a technical report proposal of up to 500 words for the technical report and presentation with questions

For the technical report and presentation with questions, the apprentice must submit a technical report proposal of up to 500 words to the EPAO. The proposal must show that the technical report will provide the opportunity for the apprentice to cover the KSBs mapped to this assessment method. The technical report proposal is not assessed. The EPAO should sign-off the technical report's title and scope at the gateway to confirm it is suitable.

- submit a portfolio of evidence for the interview with underpinning portfolio of evidence

### **Portfolio of evidence requirements:**

The apprentice must compile a portfolio of evidence during the on-programme period of the apprenticeship. It should only contain evidence related to the KSBs that will be assessed by the interview. It will typically contain 10 discrete pieces of evidence. Evidence must be mapped against the KSBs. Evidence may be used to demonstrate more than one KSB; a qualitative as opposed to quantitative approach is suggested.

Evidence sources may include workplace documentation and records, for example:

- workplace policies and procedures
- witness statements
- annotated photographs
- video clips with a maximum total duration 10 minutes; the apprentice must be in view and identifiable

This is not a definitive list; other evidence sources can be included.

The portfolio of evidence should not include reflective accounts or any methods of self-assessment. Any employer contributions should focus on direct observation of performance, for example, witness statements, rather than opinions. The evidence provided should be valid and attributable to the apprentice; the portfolio of evidence should contain a statement from the employer and apprentice confirming this.

The EPAO should not assess the portfolio of evidence directly as it underpins the interview. The independent assessor should review the portfolio of evidence to prepare questions for the interview. They are not required to provide feedback after this review.

Gateway evidence must be submitted to the EPAO, along with any organisation specific policies and procedures requested by the EPAO.

## **Order of assessment methods**

The assessment methods can be delivered in any order. The result of one assessment method does not need to be known before starting the next.

## **Technical report and presentation with questions**

### **Overview**

The technical report and presentation with questions assessment method involves the apprentice completing a significant and defined piece of work that has a real business application and benefit. This process may include for example, research, analysis and the completion of tasks or

activities to achieve the outcome. The assessment method will have an output at the end of the defined piece of work.

The work completed for the technical report and presentation with questions assessment method must meet the needs of the employer's business and be relevant to the apprentice's occupation and apprenticeship.

This assessment method has 2 components:

- technical report
- presentation with questions

Together, these components give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method. They are assessed by an independent assessor.

## Rationale

This assessment method is being used because:

- it allows for the assessment of KSBs that take place over a long period of time
- it reflects typical tasks of the occupation
- it can produce something that is of genuine business benefit to the apprentice's employer
- it can be conducted remotely, potentially reducing cost

## Delivery

The apprentice must complete a technical report based on any of the following:

- a specific problem
- recurring theme
- idea or an opportunity

To ensure the technical report and presentation with questions allows the apprentice to meet the KSBs mapped to this assessment method to the highest available grade, the EPAO must sign-off the technical report's title and scope at the gateway to confirm it is suitable. The EPAO must refer to the grading descriptors to ensure that the technical report is pitched appropriately.

The apprentice must start the technical report after the gateway. The employer should ensure the apprentice has the time and resources, within the assessment period, to plan and complete their technical report.

The apprentice may work as part of a team to complete the pre-work, such as data collection or research, for the technical report, which could include internal colleagues or technical experts.

The apprentice must however, complete their technical report and presentation with questions unaided and they must be reflective of their own role and contribution. The apprentice and their employer must confirm this when the technical report and presentation materials are submitted.

## Component 1: Technical report

Produce a technical report which evidences the KSBs mapped to this method.

The report must include at least:

- an executive summary (or abstract)
- an introduction
- the scope of the technical report
- energy and utility performance monitoring
- data collection and analysis
- solutions for improving energy and utility efficiency
- conclusions
- references
- appendix containing mapping of KSBs to the report.

The technical report must have a word count of 3000 words. A tolerance of 10% above or below is allowed at the apprentice's discretion. Appendices, references and diagrams are not included in this total. The apprentice must produce and include a mapping in an appendix, showing how the report evidences the KSBs mapped to this assessment method.

The apprentice must complete and submit the report and any presentation materials to the EPAO by the end of week 8 of the EPA period.

## **Component 2: Presentation with questions**

The presentation with questions must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

The apprentice must prepare and deliver a presentation to an independent assessor. After the presentation, the independent assessor must ask the apprentice questions about their technical report and presentation.

The presentation should cover:

- an overview of the technical report
- summary of actions undertaken by the apprentice
- technical report outcomes and how these were achieved

The presentation with questions must last 35 minutes. This will typically include a presentation of 15 minutes and questioning lasting 20 minutes. The independent assessor must use the full time available for questioning. The independent assessor can increase the time of the presentation and questioning by up to 10%. This time is to allow the apprentice to complete their last point or respond to a question if necessary.

The independent assessor must ask at least 5 questions. They must use the questions from the EPAO's question bank or create their own questions in line with the EPAO's training. Follow up questions are allowed where clarification is required.

The purpose of the independent assessor's questions is:

- to verify that the activity was completed by the apprentice
- to seek clarification where required
- to assess those KSBs that the apprentice did not have the opportunity to demonstrate with the report, although these should be kept to a minimum
- to assess level of competence against the grading descriptors

The apprentice must submit any presentation materials to the EPAO at the same time as the report - by the end of week 8 of the EPA period. The apprentice must notify the EPAO, at that point, of any technical requirements for the presentation.

During the presentation, the apprentice must have access to:

- audio-visual presentation equipment
- flip chart and writing and drawing materials
- computer

The independent assessor must have at least 2 weeks to review the technical report and any presentation materials, to allow them to prepare questions.

The apprentice must be given at least 2 weeks' notice of the presentation with questions.

The apprentice may choose to end the presentation early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method. The independent assessor or EPAO must ensure the apprentice is fully aware of all assessment requirements. The independent assessor or EPAO cannot suggest or choose to end the assessment methods early, unless in an emergency. The EPAO is responsible for ensuring the apprentice understands the implications of ending an assessment early if they choose to do so. The independent assessor may suggest the assessment continues. The independent assessor must document the apprentice's request to end the assessment early.

## Assessment decision

The independent assessor must make the grading decision. They must assess the technical report with presentation and questions components holistically when deciding the grade.

The independent assessor must keep accurate records of the assessment. They must record:

- the KSBs demonstrated in the technical report and presentation with questions
- the apprentice's answers to questions
- the grade achieved

## Assessment location

The presentation with questions must take place in a suitable venue selected by the EPAO for example, the EPAO's or employer's premises. It should take place in a quiet room, free from distractions and influence.

The presentation with questions can be conducted by video conferencing. The EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

## Question and resource development

The EPAO must develop a purpose-built assessment specification and question bank. It is recommended this is done in consultation with employers of this occupation. The EPAO must maintain the security and confidentiality of EPA materials when consulting with employers. The assessment specification and question bank must be reviewed at least once a year to ensure they remain fit-for-purpose.

The assessment specification must be relevant to the occupation and demonstrate how to assess the KSBs mapped to this assessment method. The EPAO must ensure that questions are refined and developed to a high standard. The questions must be unpredictable. A question bank of sufficient size will support this.

The EPAO must ensure that the apprentice has a different set of questions in the case of re-sits or re-takes.

EPAO must produce the following materials to support the technical report with presentation and questions:

- independent assessor EPA materials which include:
  - training materials
  - administration materials
  - moderation and standardisation materials
  - guidance materials
  - grading guidance
  - question bank
- EPA guidance for the apprentice and the employer

The EPAO must ensure that the EPA materials are subject to quality assurance procedures including standardisation and moderation.

## Interview with underpinning portfolio of evidence

### Overview

In the interview, an independent assessor asks the apprentice questions. It gives the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method.

### Rationale

This assessment method is being used because:

- it assesses KSBs holistically and objectively
- it allows for the assessment of KSBs that do not occur on a predictable or regular basis

- it allows for assessment of responses where there are a range of potential answers
  - it can be conducted remotely, potentially reducing cost
- reduces the assessment burden on the apprentice

## Delivery

The interview must be structured to give the apprentice the opportunity to demonstrate the KSBs mapped to this assessment method to the highest available grade.

An independent assessor must conduct and assess the interview.

The purpose of the independent assessor's questions will be to assess the apprentice's competence against the following themes:

- energy management profession
- energy auditing
- quality assurance
- information technology and digital
- team working and communication

The EPAO must give an apprentice 2 weeks' notice of the interview.

The independent assessor must have at least 2 weeks to review the supporting documentation.

The apprentice must have access to their portfolio of evidence during the interview.

The apprentice can refer to and illustrate their answers with evidence from their portfolio of evidence however, the portfolio of evidence is not directly assessed.

The interview must last for 45 minutes. The independent assessor can increase the time of the interview by up to 10%. This time is to allow the apprentice to respond to a question if necessary.

The independent assessor must ask at least 8 questions. The independent assessor must use the questions from the EPAO's question bank or create their own questions in line with the EPAO's training. Follow-up questions are allowed where clarification is required.

The apprentice may choose to end the assessment method early. The apprentice must be confident they have demonstrated competence against the assessment requirements for the assessment method. The independent assessor or EPAO must ensure the apprentice is fully aware of all assessment requirements. The independent assessor or EPAO cannot suggest or choose to end the assessment methods early, unless in an emergency. The EPAO is responsible for ensuring the apprentice understands the implications of ending an assessment early if they choose to do so. The independent assessor may suggest the assessment continues. The independent assessor must document the apprentice's request to end the assessment early.

The independent assessor must make the grading decision.

The independent assessor must keep accurate records of the assessment. They must record:

- the apprentice's answers to questions
- the KSBs demonstrated in answers to questions
- the grade achieved

## Assessment location

The interview must take place in a suitable venue selected by the EPAO for example, the EPAO's or employer's premises.

The interview can be conducted by video conferencing. The EPAO must have processes in place to verify the identity of the apprentice and ensure the apprentice is not being aided.

The interview should take place in a quiet room, free from distractions and influence.

## Question and resource development

The EPAO must develop a purpose-built assessment specification and question bank. It is recommended this is done in consultation with employers of this occupation. The EPAO must maintain the security and confidentiality of EPA materials when consulting with employers. The assessment specification and question bank must be reviewed at least once a year to ensure they remain fit-for-purpose.

The assessment specification must be relevant to the occupation and demonstrate how to assess the KSBs mapped to this assessment method. The EPAO must ensure that questions are refined and developed to a high standard. The questions must be unpredictable. A question bank of sufficient size will support this.

The EPAO must ensure that the apprentice has a different set of questions in the case of re-sits or re-takes.

The EPAO must produce the following materials to support the interview with underpinning portfolio of evidence:

- independent assessor assessment materials which include:
  - training materials
  - administration materials
  - moderation and standardisation materials
  - guidance materials
  - grading guidance
  - question bank
- EPA guidance for the apprentice and the employer

The EPAO must ensure that the EPA materials are subject to quality assurance procedures including standardisation and moderation.

## Grading

## Technical report and presentation with questions

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Planning <a href="#">K2 K8</a> <a href="#">K21 S2 S6 S17</a>	<p>Complies with energy management related policies, procedures, processes, standards, specifications and codes of practice to meet the needs of the technical report. (K2, S2)</p> <p>Plans and prioritises own work to meet the timelines of the technical report. (K8, S6)</p> <p>Interprets and extracts information from sources to meet the needs of the technical report. (K21, S17)</p>	None.
Health and safety <a href="#">K3 K4 S3 S4 B1</a>	<p>Prioritises health and safety for themselves and others by applying safe-working practices, including risk assessments, method statements, control measure application and safe systems of work, and follows health and safety regulations and procedures to meet the needs of the technical report. (K3, K4, S3, S4, B1)</p>	None.
Analysing energy systems and performance <a href="#">K11</a> <a href="#">K15 K16 S8 S12</a>	<p>Collects, stores, analyses, monitors and reports energy performance data in line with organisational guidelines and to meet the needs of the technical report. (K11, K15, K16, S8, S12)</p>	<p>Critically analyses energy performance data in line with organisational guidelines and to meet the needs of the technical report. (K16, S12)</p>

<p>Problem solving and identifying solutions <a href="#">K6</a> <a href="#">K10</a> <a href="#">K19</a> <a href="#">K28</a> <a href="#">S7</a> <a href="#">S15</a> <a href="#">S22</a></p>	<p>Applies problem solving techniques to identify improvements, and repairs or replacements, to energy systems or processes that reduce energy consumption and meet the needs of the technical report. (K6, K10, K19, K28, S7, S15, S22)</p>	<p>Justifies their identified solutions for improvements, and repairs or replacements, to energy systems or processes that reduce energy consumption and meet the needs of the technical report. (K19, S7, S15)</p>
<p>Technical reporting <a href="#">K24</a> <a href="#">K29</a> <a href="#">K30</a> <a href="#">S23</a> <a href="#">S24</a> <a href="#">S26</a></p>	<p>Applies technical report writing techniques and principles of feedback to communicate their technical advice using industry specific terminology to meet the needs of the technical report. (K24, K30, S24, S26)</p> <p>Communicates verbally when presenting their technical report using industry specific terminology and adapts their style to the audience. (K29, S23)</p>	<p>Justifies the technical report writing techniques and principles of feedback they have applied and their use of industry specific terminology to communicate in writing. (K24, K30, S24, S26)</p>
<p>Implementation <a href="#">K5</a> <a href="#">K17</a> <a href="#">S5</a> <a href="#">S13</a> <a href="#">B2</a></p>	<p>Implements energy management and decarbonisation strategies, policy or plans, applying sustainability principles and techniques to meet the needs of the technical report. (K5, K17, S5, S13, B2)</p>	<p>Identifies improvements to how energy management and decarbonisation strategies, policy or plans could be implemented or how sustainability principles and techniques could be applied to meet the needs of the technical report. (K5, K17, S5, S13)</p>
<p>Utilities usage <a href="#">K18</a> <a href="#">S14</a></p>	<p>Identifies, monitors and analyses the usage of utilities and their emissions to meet the needs of the technical report. (K18, S14)</p>	<p>Critically analyses the usage of utilities and their emissions to meet the needs of the technical report. (K18, S14)</p>

## Interview with underpinning portfolio of evidence

Fail - does not meet pass criteria

THEME KSBS	PASS APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS	DISTINCTION APPRENTICES MUST DEMONSTRATE ALL OF THE PASS DESCRIPTORS AND ALL OF THE DISTINCTION DESCRIPTORS
Energy management profession K1 K7 K9 S1 B6	<p>Explains how they act professionally and comply with energy regulations and legislation relevant to their role. (K1, S1, B6)</p> <p>Outlines project management techniques used in the energy management profession. (K7)</p> <p>Outlines how various energy sources affect the transition to net zero. (K9)</p>	Explains the impact on their employer of energy regulation and legislation compliance and non-compliance. (K1, S1)
Energy auditing K12 K13 K14 S9 S10 S11 B7	<p>Describes how they apply energy and water assessment and audit techniques, adapting and responding to work demands and situations relevant to their role. (K12, S9, B7)</p> <p>Explains how they read, collect and record metered data, and analyse utility bills to meet the needs of the task. (K13, K14, S10, S11)</p>	Explains the benefits to their employer and stakeholders of energy and water assessments and audits. (K12, S9)
Quality assurance K20 S16	Describes how they apply quality assurance procedures to meet the needs of the task. (K20, S16)	None.
Information technology and digital K22 K23 S18 S19 B5	Describes how they act ethically using information technology and digital systems to monitor energy use, in line with GDPR and cyber security regulations and policies. (K22, K23, S18, S19, B5)	Outlines the benefits to their employer and stakeholders of ensuring GDPR and cyber security regulations and policies are followed. (K23, S19)
Team working K25 K26 K27 K31 S20 S21 S25 B3 B4	Describes how they collaborate with others and support equity, diversity and inclusion when applying team working principles. (K25, K26, S20, S21, B3, B4)	Explains the benefits of supporting a diverse and inclusive culture for their employer. (K25, S20)

	<p>Outlines mental health awareness and personal wellbeing relevant to their role. (K27)</p> <p>Explains how they recognise the limitations of their role, seek input from others, and escalate issues when required to achieve the task. (K31, S25)</p>	
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### Overall EPA grading

Performance in the EPA determines the overall grade of:

- fail
- pass
- merit
- distinction

An independent assessor must individually grade the technical report and presentation with questions and interview with underpinning portfolio of evidence in line with this EPA plan.

The EPAO must combine the individual assessment method grades to determine the overall EPA grade.

If the apprentice fails one assessment method or more, they will be awarded an overall fail.

To achieve an overall pass, the apprentice must achieve at least a pass in all the assessment methods. To achieve an overall distinction, the apprentice must achieve a distinction in all assessment methods.

Grades from individual assessment methods must be combined in the following way to determine the grade of the EPA overall.

TECHNICAL REPORT AND PRESENTATION WITH QUESTIONS	INTERVIEW WITH UNDERPINNING PORTFOLIO OF EVIDENCE	OVERALL GRADING
Any grade	Fail	Fail
Fail	Any grade	Fail
Pass	Pass	Pass
Distinction	Pass	Merit
Pass	Distinction	Merit
Distinction	Distinction	Distinction

## Re-sits and re-takes

If the apprentice fails one assessment method or more, they can take a re-sit or a re-take at their employer's discretion. The apprentice's employer needs to agree that a re-sit or re-take is appropriate. A re-sit does not need further learning, whereas a re-take does. The apprentice should have a supportive action plan to prepare for a re-sit or a re-take.

The employer and the EPAO should agree the timescale for a re-sit or re-take. A re-sit is typically taken within 2 months of the EPA outcome notification. The timescale for a re-take is dependent on how much re-training is required and is typically taken within 4 months of the EPA outcome notification.

If the apprentice fails the technical report with presentation and questions assessment method, they may amend the technical report in line with the independent assessor's feedback. The apprentice will be given 4 weeks to rework and submit their amended technical report if required.

Failed assessment methods must be re-sat or re-taken within a 6-month period from the EPA outcome notification, otherwise the entire EPA will need to be re-sat or re-taken in full.

Re-sits and re-takes are not offered to an apprentice wishing to move from pass to a higher grade.

The apprentice will get a maximum EPA grade of pass if they need to re-sit or re-take one or more assessment methods, unless the EPAO determines there are exceptional circumstances.

## Roles and responsibilities

ROLES	RESPONSIBILITIES
Apprentice	<p>As a minimum, the apprentice should:</p> <ul style="list-style-type: none"> <li>• complete on-programme training to meet the KSBs as outlined in the apprenticeship standard for a minimum of 12 months</li> <li>• complete the required amount of off-the-job training specified by the apprenticeship funding rules and as arranged by the employer and training provider</li> <li>• understand the purpose and importance of EPA</li> <li>• prepare for and undertake the EPA including meeting all gateway requirements</li> </ul>
Employer	<p>As a minimum, the apprentice's employer must:</p> <ul style="list-style-type: none"> <li>• select the training provider</li> <li>• work with the training provider to select the EPAO</li> <li>• work with the training provider, where applicable, to support the apprentice in the workplace and to provide the opportunities for the apprentice to develop the KSBs</li> <li>• arrange and support off-the-job training to be undertaken by the apprentice</li> <li>• decide when the apprentice is working at or above the apprenticeship standard and is ready for EPA</li> <li>• ensure the apprentice is prepared for the EPA</li> <li>• ensure that all supporting evidence required at the gateway is submitted in line with this EPA plan</li> <li>• confirm arrangements with the EPAO for the EPA in a timely manner, including who, when, where</li> <li>• provide the EPAO with access to any employer-specific documentation as required for example, company policies</li> <li>• ensure that the EPA is scheduled with the EPAO for a date and time which allows appropriate opportunity for the apprentice to meet the KSBs</li> <li>• ensure the apprentice is given sufficient time away from regular duties to prepare for, and complete the EPA</li> <li>• ensure that any required supervision during the EPA period, as stated within this EPA plan, is in place</li> <li>• ensure the apprentice has access to the resources used to fulfil their role and carry out the EPA for workplace based assessments</li> </ul> <p>remain independent from the delivery of the EPA</p>

EPAO	<ul style="list-style-type: none"> <li>• pass the certificate to the apprentice upon receipt</li> </ul> <p>As a minimum, the EPAO must:</p> <ul style="list-style-type: none"> <li>• conform to the requirements of this EPA plan and deliver its requirements in a timely manner</li> <li>• conform to the requirements of the external quality assurance provider (EQAP)</li> <li>• understand the apprenticeship including the occupational standard and EPA plan</li> <li>• make all necessary contractual arrangements including agreeing the price of the EPA</li> <li>• develop and produce assessment materials including specifications and marking materials, for example mark schemes, practice materials, training material</li> <li>• maintain and apply a policy for the declaration and management of conflict of interests and independence. This must ensure, as a minimum, there is no personal benefit or detriment for those delivering the EPA or from the result of an assessment. It must cover: <ul style="list-style-type: none"> <li>• apprentices</li> <li>• employers</li> <li>• independent assessors</li> <li>• any other roles involved in delivery or grading of the EPA</li> </ul> </li> <li>• have quality assurance systems and procedures that ensure fair, reliable and consistent assessment and maintain records of internal quality assurance (IQA) activity for external quality assurance (EQA) purposes</li> <li>• appoint independent, competent, and suitably qualified assessors in line with the requirements of this EPA plan</li> <li>• appoint administrators, invigilators and any other roles where required to facilitate the EPA</li> <li>• deliver induction, initial and on-going training for all their independent assessors and any other roles involved in the delivery or grading of the EPA as specified within this EPA plan. This should include how to record the rationale and evidence for grading decisions where required</li> <li>• conduct standardisation with all their independent assessors before allowing them to deliver an EPA, when the EPA is updated, and at least once a year</li> </ul>
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	<ul style="list-style-type: none"> <li>• conduct moderation across all of their independent assessors' decisions once EPAs have started according to a sampling plan, with associated risk rating of independent assessors</li> <li>• monitor the performance of all their independent assessors and provide additional training where necessary</li> <li>• develop and provide assessment recording documentation to ensure a clear and auditable process is in place for providing assessment decisions and feedback to all relevant stakeholders</li> <li>• use language in the development and delivery of the EPA that is appropriate to the level of the apprenticeship</li> <li>• arrange for the EPA to take place in a timely manner, in consultation with the employer</li> <li>• provide information, advice, and guidance documentation to enable apprentices, employers and training providers to prepare for the EPA</li> <li>• confirm the gateway requirements have been met before they start the EPA for an apprentice</li> <li>• arrange a suitable venue for the EPA</li> <li>• maintain the security of the EPA including, but not limited to, verifying the identity of the apprentice, invigilation and security of materials</li> <li>• where the EPA plan permits assessment away from the workplace, ensure that the apprentice has access to the required resources and liaise with the employer to agree this if necessary</li> <li>• confirm the overall grade awarded</li> <li>• maintain and apply a policy for conducting appeals</li> </ul>
<p>Independent assessor</p>	<p>As a minimum, an independent assessor must:</p> <ul style="list-style-type: none"> <li>• be independent, with no conflict of interest with the apprentice, their employer or training provider, specifically, they must not receive a personal benefit or detriment from the result of the assessment</li> <li>• have, maintain and be able to evidence up-to-date knowledge and expertise of the occupation</li> <li>• have the competence to assess the EPA and meet the requirements of the IQA section of this EPA plan</li> <li>• understand the apprenticeship's occupational standard and EPA plan</li> <li>• attend induction and standardisation events before they conduct an EPA for the first time, when the EPA is updated, and</li> </ul>

	<p>at least once a year</p> <ul style="list-style-type: none"> <li>• use language in the delivery of the EPA that is appropriate to the level of the apprenticeship</li> <li>• work with other personnel, where used, in the preparation and delivery of assessment methods</li> <li>• conduct the EPA to assess the apprentice against the KSBs and in line with the EPA plan</li> <li>• make final grading decisions in line with this EPA plan</li> <li>• record and report assessment outcome decisions</li> <li>• comply with the IQA requirements of the EPAO</li> <li>• comply with external quality assurance (EQA) requirements</li> </ul>
<p>Training provider</p>	<p>As a minimum, the training provider must:</p> <ul style="list-style-type: none"> <li>• conform to the requirements of the apprenticeship provider and assessment register</li> <li>• ensure procedures are in place to mitigate against any conflict of interest</li> <li>• work with the employer and support the apprentice during the off-the-job training to provide the opportunities to develop the KSBs as outlined in the occupational standard</li> <li>• deliver training to the apprentice as outlined in their apprenticeship agreement</li> <li>• monitor the apprentice’s progress during any training provider led on-programme learning</li> <li>• ensure the apprentice is prepared for the EPA</li> <li>• work with the employer to select the EPAO</li> <li>• advise the employer, upon request, on the apprentice’s readiness for EPA</li> <li>• ensure that all supporting evidence required at the gateway is submitted in line with this EPA plan</li> <li>• remain independent from the delivery of the EPA</li> </ul>

## Reasonable adjustments

### Reasonable adjustments

The EPAO must have reasonable adjustments arrangements for the EPA.

This should include:

- how an apprentice qualifies for a reasonable adjustment
- what reasonable adjustments may be made

Adjustments must maintain the validity, reliability and integrity of the EPA as outlined in this EPA plan.

### **Special considerations**

The EPAO must have special consideration arrangements for the EPA.

This should include:

- how an apprentice qualifies for a special consideration
- what special considerations will be given

Special considerations must maintain the validity, reliability and integrity of the EPA as outlined in this EPA plan.

### **Internal quality assurance**

Internal quality assurance refers to the strategies, policies and procedures that an EPAO must have in place to ensure valid, consistent and reliable EPA decisions.

EPAOs for this EPA must adhere to the requirements within the roles and responsibilities table.

They must also appoint independent assessors who:

- have recent relevant experience of the occupation or sector to at least occupational level 3 gained in the last 3 years or significant experience of the occupation or sector

### **Value for money**

Affordability of the EPA will be aided by using at least some of the following:

- completing applicable assessment methods online, for example computer-based assessment
- utilising digital remote platforms to conduct applicable assessment methods
- using the employer's premises
- conducting assessment methods on the same day

### **Professional recognition**

This apprenticeship is not aligned to professional recognition.

### **KSB mapping table**

KNOWLEDGE	ASSESSMENT METHODS
<b>K1</b> Awareness of regulations and legislation that impact the energy management.	Interview with underpinning portfolio of evidence
<b>K2</b> Energy related policies procedures, processes, standards, specifications and codes of practice.	Technical report and presentation with questions
<b>K3</b> Health and safety regulations and procedures, relevance to the occupation.	Technical report and presentation with questions
<b>K4</b> Safe-working practices including risk assessments, method statements, control measure application and safe systems of work.	Technical report and presentation with questions
<b>K5</b> Current and developing sustainability principles and techniques.	Technical report and presentation with questions
<b>K6</b> Energy resource management considerations: cost, quality, safety, security, society and environmental impact.	Technical report and presentation with questions
<b>K7</b> Awareness of project management techniques.	Interview with underpinning portfolio of evidence
<b>K8</b> Planning, prioritising, work scheduling and time management techniques.	Technical report and presentation with questions
<b>K9</b> Awareness of how various energy sources affect the transition to net zero.	Interview with underpinning portfolio of evidence
<b>K10</b> Energy systems and processes and the principles of reducing energy consumption.	Technical report and presentation with questions

<p><b>K11</b> Data collection, storage and reporting methods and techniques</p>	Technical report and presentation with questions
<p><b>K12</b> Energy and water assessment and auditing principles and techniques.</p>	Interview with underpinning portfolio of evidence
<p><b>K13</b> Meter reading techniques: reading, collecting and recording data.</p>	Interview with underpinning portfolio of evidence
<p><b>K14</b> Principles of utility procurement, billing, tariff, supplier query and negotiations.</p>	Interview with underpinning portfolio of evidence
<p><b>K15</b> Principles of energy baselines and the variables that affect energy consumption.</p>	Technical report and presentation with questions
<p><b>K16</b> Energy performance monitoring and analysis: techniques, processes, systems and equipment. Factors affecting energy use, efficiency and inefficiency.</p>	Technical report and presentation with questions
<p><b>K17</b> Principles of developing and implementing strategies, policies and plans for energy management and decarbonisation.</p>	Technical report and presentation with questions
<p><b>K18</b> Techniques to identify, monitor and analyse utilities usage and their emissions.</p>	Technical report and presentation with questions
<p><b>K19</b> The principles and requirements of repairs, replacements and improvements related to energy system infrastructure and processes.</p>	Technical report and presentation with questions
<p><b>K20</b> Quality assurance procedures.</p>	Interview with underpinning portfolio of evidence

<p><b>K21</b> Methods of interpreting and extracting relevant information from sources such as manufacturer's instructions, drawings, plans, specifications, and previous reports.</p>	<p>Technical report and presentation with questions</p>
<p><b>K22</b> Principles and use for using information technology and digital systems to monitor energy use.</p>	<p>Interview with underpinning portfolio of evidence</p>
<p><b>K23</b> General Data Protection Regulation (GDPR). Cyber security.</p>	<p>Interview with underpinning portfolio of evidence</p>
<p><b>K24</b> Principles of providing feedback to improve the quality of energy management.</p>	<p>Technical report and presentation with questions</p>
<p><b>K25</b> Principles of equity, diversity, and inclusion in the workplace. Unconscious bias.</p>	<p>Interview with underpinning portfolio of evidence</p>
<p><b>K26</b> Team working and collaboration principles.</p>	<p>Interview with underpinning portfolio of evidence</p>
<p><b>K27</b> Personal wellbeing and mental health awareness.</p>	<p>Interview with underpinning portfolio of evidence</p>
<p><b>K28</b> Problem solving techniques.</p>	<p>Technical report and presentation with questions</p>
<p><b>K29</b> Verbal communication techniques. Giving and receiving information. Adapting style to audience. Barriers in communication and how to overcome them. Specific terminology.</p>	<p>Technical report and presentation with questions</p>
<p><b>K30</b> Written communication techniques. Plain English principles, specific terminology and technical report writing.</p>	<p>Technical report and presentation with questions</p>
<p><b>K31</b> When to escalate tasks and issues, and to whom.</p>	<p>Interview with underpinning portfolio of evidence</p>

SKILL	ASSESSMENT METHODS
<b>S1</b> Comply with energy regulations and legislation.	Interview with underpinning portfolio of evidence
<b>S2</b> Comply with energy management related policies, procedures, processes, standards, specifications and codes of practice.	Technical report and presentation with questions
<b>S3</b> Follow health and safety regulations and procedures.	Technical report and presentation with questions
<b>S4</b> Apply safe-working practices: risk assessments, method statements control measures and safe systems of work.	Technical report and presentation with questions
<b>S5</b> Apply sustainability principles and techniques.	Technical report and presentation with questions
<b>S6</b> Plan and prioritise own work.	Technical report and presentation with questions
<b>S7</b> Identify improvements to systems and process that reduce energy consumption.	Technical report and presentation with questions
<b>S8</b> Collect, store and report data.	Technical report and presentation with questions
<b>S9</b> Apply energy and water assessments and audit techniques.	Interview with underpinning portfolio of evidence
<b>S10</b> Read, collect and record metered data.	Interview with underpinning portfolio of evidence
<b>S11</b> Analyse utility bills.	Interview with underpinning portfolio of evidence

<p><b>S12</b> Analyse and monitor energy performance data.</p>	Technical report and presentation with questions
<p><b>S13</b> Implement energy management and decarbonisation strategies, policy or plans.</p>	Technical report and presentation with questions
<p><b>S14</b> Identify, monitor and analyse usage of utilities and their emissions.</p>	Technical report and presentation with questions
<p><b>S15</b> Identify options for repairs or replacements related to energy system infrastructure.</p>	Technical report and presentation with questions
<p><b>S16</b> Apply quality assurance procedures.</p>	Interview with underpinning portfolio of evidence
<p><b>S17</b> Interpret and extract information from sources such as manufacturer's instructions, drawings, plans, specifications, or previous reports.</p>	Technical report and presentation with questions
<p><b>S18</b> Use information technology and digital systems to monitor energy use.</p>	Interview with underpinning portfolio of evidence
<p><b>S19</b> Comply with GDPR and cyber security regulations and policies.</p>	Interview with underpinning portfolio of evidence
<p><b>S20</b> Apply policies and practices to support equity, diversity and inclusion.</p>	Interview with underpinning portfolio of evidence
<p><b>S21</b> Apply team working principles.</p>	Interview with underpinning portfolio of evidence
<p><b>S22</b> Apply problem solving techniques.</p>	Technical report and presentation with questions

<b>S23</b> Communicate verbally using industry specific terminology.	Technical report and presentation with questions
<b>S24</b> Communicate in writing using industry specific terminology.	Technical report and presentation with questions
<b>S25</b> Recognise limitations of their role, seek input from others and escalate issues when required.	Interview with underpinning portfolio of evidence
<b>S26</b> Apply technical reporting writing techniques.	Technical report and presentation with questions
<b>BEHAVIOUR</b>	<b>ASSESSMENT METHODS</b>
<b>B1</b> Prioritise health and safety for themselves and others.	Technical report and presentation with questions
<b>B2</b> Contribute towards a sustainable workplace.	Technical report and presentation with questions
<b>B3</b> Contributes to equity, diversity, and inclusivity workplace culture.	Interview with underpinning portfolio of evidence
<b>B4</b> Collaborate with others.	Interview with underpinning portfolio of evidence
<b>B5</b> Act ethically.	Interview with underpinning portfolio of evidence
<b>B6</b> Act professionally.	Interview with underpinning portfolio of evidence
<b>B7</b> Respond and adapt to work demands and situations.	Interview with underpinning portfolio of evidence

## Mapping of KSBs to grade themes

## Technical report and presentation with questions

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Planning K2 K8 K21 S2 S6 S17	<p>Energy related policies procedures, processes, standards, specifications and codes of practice. (K2)</p> <p>Planning, prioritising, work scheduling and time management techniques. (K8)</p> <p>Methods of interpreting and extracting relevant information from sources such as manufacturer's instructions, drawings, plans, specifications, and previous reports. (K21)</p>	<p>Comply with energy management related policies, procedures, processes, standards, specifications and codes of practice. (S2)</p> <p>Plan and prioritise own work. (S6)</p> <p>Interpret and extract information from sources such as manufacturer's instructions, drawings, plans, specifications, or previous reports. (S17)</p>	None
Health and safety K3 K4 S3 S4 B1	<p>Health and safety regulations and procedures, relevance to the occupation. (K3)</p> <p>Safe-working practices including risk assessments, method statements, control measure application and safe systems of work. (K4)</p>	<p>Follow health and safety regulations and procedures. (S3)</p> <p>Apply safe-working practices: risk assessments, method statements control measures and safe systems of work. (S4)</p>	Prioritise health and safety for themselves and others. (B1)
Analysing energy systems and performance K11 K15 K16 S8 S12	<p>Data collection, storage and reporting methods and techniques (K11)</p> <p>Principles of energy baselines and the variables that affect</p>	<p>Collect, store and report data. (S8)</p> <p>Analyse and monitor energy performance data. (S12)</p>	None

	<p>energy consumption. (K15)</p> <p>Energy performance monitoring and analysis: techniques, processes, systems and equipment. Factors affecting energy use, efficiency and inefficiency. (K16)</p>		
<p>Problem solving and identifying solutions K6 K10 K19 K28 S7 S15 S22</p>	<p>Energy resource management considerations: cost, quality, safety, security, society and environmental impact. (K6)</p> <p>Energy systems and processes and the principles of reducing energy consumption. (K10)</p> <p>The principles and requirements of repairs, replacements and improvements related to energy system infrastructure and processes. (K19)</p> <p>Problem solving techniques. (K28)</p>	<p>Identify improvements to systems and process that reduce energy consumption. (S7)</p> <p>Identify options for repairs or replacements related to energy system infrastructure. (S15)</p> <p>Apply problem solving techniques. (S22)</p>	None
<p>Technical reporting K24 K29 K30 S23 S24 S26</p>	<p>Principles of providing feedback to improve the quality of energy management. (K24)</p> <p>Verbal communication techniques. Giving and receiving information. Adapting style to audience.</p>	<p>Communicate verbally using industry specific terminology. (S23)</p> <p>Communicate in writing using industry specific terminology. (S24)</p> <p>Apply technical reporting writing</p>	None

	<p>Barriers in communication and how to overcome them. Specific terminology. (K29)</p> <p>Written communication techniques. Plain English principles, specific terminology and technical report writing. (K30)</p>	<p>techniques. (S26)</p>	
<p>Implementation K5 K17 S5 S13 B2</p>	<p>Current and developing sustainability principles and techniques. (K5)</p> <p>Principles of developing and implementing strategies, policies and plans for energy management and decarbonisation. (K17)</p>	<p>Apply sustainability principles and techniques. (S5)</p> <p>Implement energy management and decarbonisation strategies, policy or plans. (S13)</p>	<p>Contribute towards a sustainable workplace. (B2)</p>
<p>Utilities usage K18 S14</p>	<p>Techniques to identify, monitor and analyse utilities usage and their emissions. (K18)</p>	<p>Identify, monitor and analyse usage of utilities and their emissions. (S14)</p>	<p>None</p>

**Interview with underpinning portfolio of evidence**

KSBS GROUPED BY THEME	KNOWLEDGE	SKILLS	BEHAVIOUR
Energy management profession K1 K7 K9 S1 B6	<p>Awareness of regulations and legislation that impact the energy management. (K1)</p> <p>Awareness of project management techniques. (K7)</p> <p>Awareness of how various energy sources affect the transition to net zero. (K9)</p>	Comply with energy regulations and legislation. (S1)	Act professionally. (B6)
Energy auditing K12 K13 K14 S9 S10 S11 B7	<p>Energy and water assessment and auditing principles and techniques. (K12)</p> <p>Meter reading techniques: reading, collecting and recording data. (K13)</p> <p>Principles of utility procurement, billing, tariff, supplier query and negotiations. (K14)</p>	<p>Apply energy and water assessments and audit techniques. (S9)</p> <p>Read, collect and record metered data. (S10)</p> <p>Analyse utility bills. (S11)</p>	Respond and adapt to work demands and situations. (B7)
Quality assurance K20 S16	Quality assurance procedures. (K20)	Apply quality assurance procedures. (S16)	None

Information technology and digital K22 K23 S18 S19 B5	Principles and use for using information technology and digital systems to monitor energy use. (K22)  General Data Protection Regulation (GDPR). Cyber security. (K23)	Use information technology and digital systems to monitor energy use. (S18)  Comply with GDPR and cyber security regulations and policies. (S19)	Act ethically. (B5)
Team working K25 K26 K27 K31 S20 S21 S25 B3 B4	Principles of equity, diversity, and inclusion in the workplace. Unconscious bias. (K25)  Team working and collaboration principles. (K26)  Personal wellbeing and mental health awareness. (K27)  When to escalate tasks and issues, and to whom. (K31)	Apply policies and practices to support equity, diversity and inclusion. (S20)  Apply team working principles. (S21)  Recognise limitations of their role, seek input from others and escalate issues when required. (S25)	Contributes to equity, diversity, and inclusivity workplace culture. (B3)  Collaborate with others. (B4)

## Version log

Version	Change detail	Earliest start date	Latest start date
Revised version awaiting implementation	Occupational standard, end-point assessment plan and funding band revised.	24/03/2025	Not set
1.1	End-point assessment plan and standard revised.	28/07/2022	23/03/2025
1.0	Approved for delivery	01/12/2015	27/07/2022

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